

Small team? No problem. iWave helps nonprofit teams of any size work faster and go further.

Background

Menlo School is a private college preparatory school in Atherton, California. Their mission is to empower students to reach their fullest potential, develop the skills necessary for success in college, and become ethical, responsible, and engaged members of their communities. The five-person Development Team at Menlo School helps move this mission forward by soliciting gifts from families and alumni. Vidya Kagan is the Director of Data Management and Research. “By and large, I do most of the research for our team” said Vidya, “my team relies on me to uncover the top prospects to drive our fundraising efforts and support Menlo.”

The Challenge

Vidya and her team launched a capital campaign in 2015 and they knew they needed to solicit both existing and new donors for gifts. The challenge was that they had little comprehensive donor intel in their database that the team could draw from before making an ask. Vidya manually researched hundreds of parents, alumni, grandparents, and families in the Menlo community through platforms like LinkedIn and Google. But Vidya needed a tool to help her confidently find, in a systematic, organized way, the right people to pass on to her team so they could make the right asks. That’s where iWave came in.

The Solution

The Menlo School Development team started using iWave in the Fall of 2015 to support their capital campaign efforts. “In the beginning, we mainly used iWave for campaign prospecting,” said Vidya, “I would share my iWave donor research with my colleagues, Head of School, and our volunteers who would be making the asks.” As the years progressed and Menlo’s campaign kept moving along, Vidya also started using iWave to research new families and alumni. “We have about 100 families that join the Menlo community every year, so I run that through a screen in iWave,” she said, “then I drill down into about a third of that list that have the highest iWave Score and focus on those top prospects.” The screens enable Vidya to work faster because they prioritize the donors by score. In a similar way, Vidya screens alumni based on their graduating year. She sorts the results by highest iWave Score and highest capacity, conducts in-depth research, and build profiles on each alum.

Lately, Vidya has leveraged iWave’s new Multi-Lens Scoring feature and enjoys the ability to look at donors through different lenses based on different projects. “It’s a more organic view of our prospects,” she said. “We use the ‘Education lens’, of course, and being able to look at other areas of affinity like Arts or Philanthropy simultaneously helps us get a clearer picture of our prospect’s interests and philanthropic inclination.”

Menlo School started with a need to fuel their capital campaign and now uses iWave regularly to not only screen existing and new prospects, but also to dive into a deeper segmentation of their database. This allows them to go further, faster, with their small team. To sum up her experience with iWave so far, Vidya said “iWave is educating my whole team so that we are as prepared as we can be to make the right asks to the right people.”



ORGANIZATION

Menlo School

LOCATION

Atherton, CA

INDUSTRY

Education

KEY CHALLENGE

Pulling out the best prospects based on different fundraising strategies.

KEY BENEFIT

Getting a clearer picture of prospect’s giving interests with iWave’s Multi-Lens Scoring.



“[iWave’s Multi-Lens Scoring provides] a more organic view of our prospects. Being able to look at other areas of affinity simultaneously helps us get a clearer picture of our prospect’s interests and philanthropic inclination.”

VIDYA KAGAN
Director of Data
Management and
Research